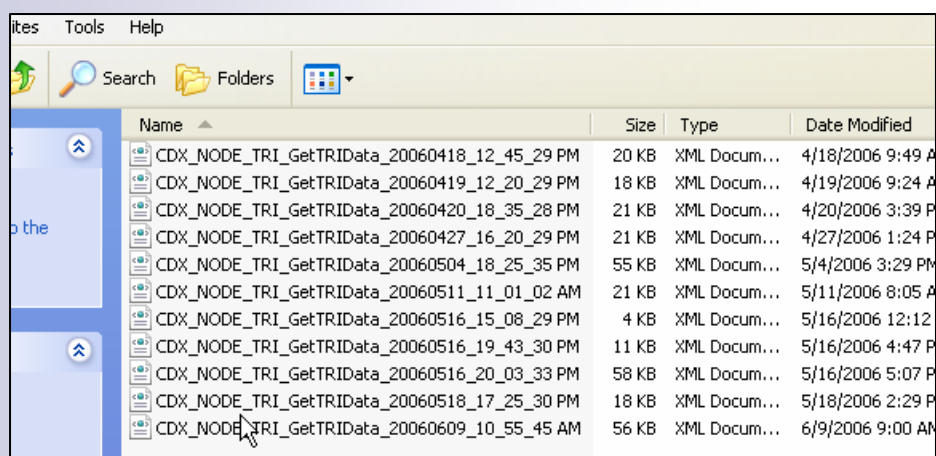


# TRI SDX Tracker Instructions

**Objective 1: Using Microsoft Excel to display a list of the TRI reports received by the TRI State Data Exchange.**

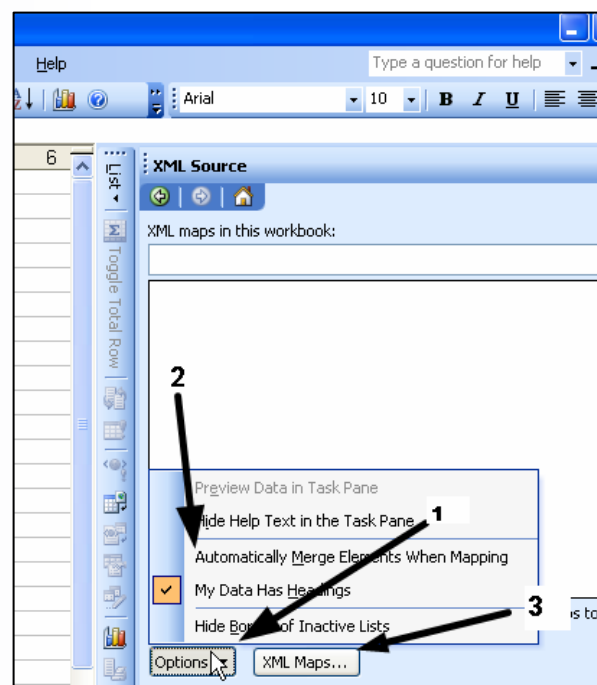
1. Copy the XML files into to a subdirectory, like *c:\I xml test demo*.

Figure 1: Extracted xml files as received



2. **Open a new workbook in Microsoft Excel**
3. **Select Data, XML, XML Source.** Since there are no XML files open yet, the XML source is blank.
4. **Important step:** Select options (see Figure 2—task 1). Un-check “Automatically merge elements when mapping.” (Figure 2— task 2).
5. **Select XML Maps.** (Figure 2— task 3 ) **Select Add.** This will bring up the browser and allows you to open the folder containing your XML files.
6. **Select any one of the XML files. Select import.** This will bring up the name of the schema associated with the file.

Figure 2: Step 4— task 1, 2 and 3



**Note:** This demo uses Washington State’s 2005 TRI xml files. They have not been parsed. Any SDX XML state files can be used. You will need Microsoft Excel 2003 in Microsoft Office Professional or a later version to use *TRI SDX Tracker* to process XML files. Originally developed by the State of Kentucky.

# TRI SDX Tracker Instructions

Fig. 3: Select one file as source.

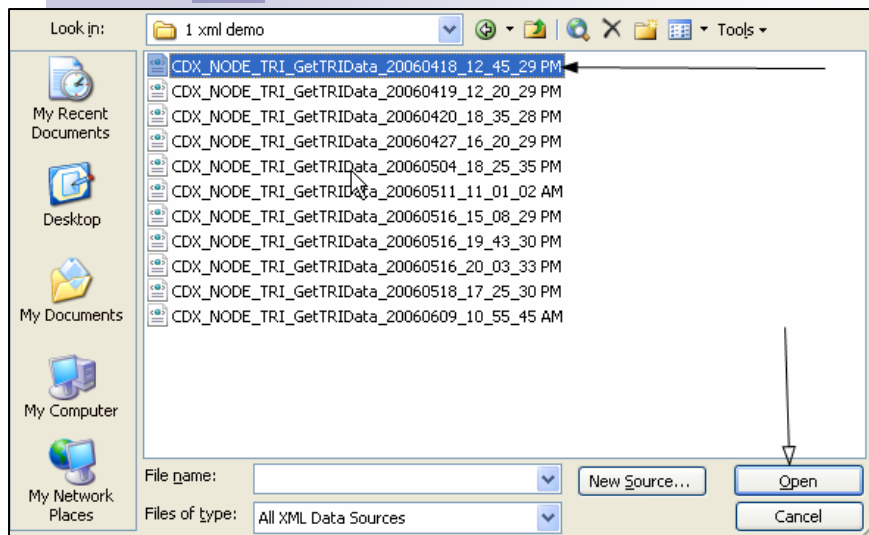
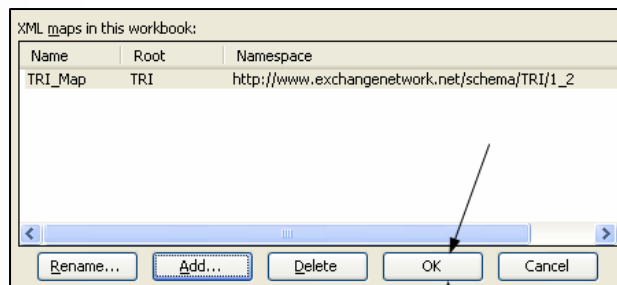
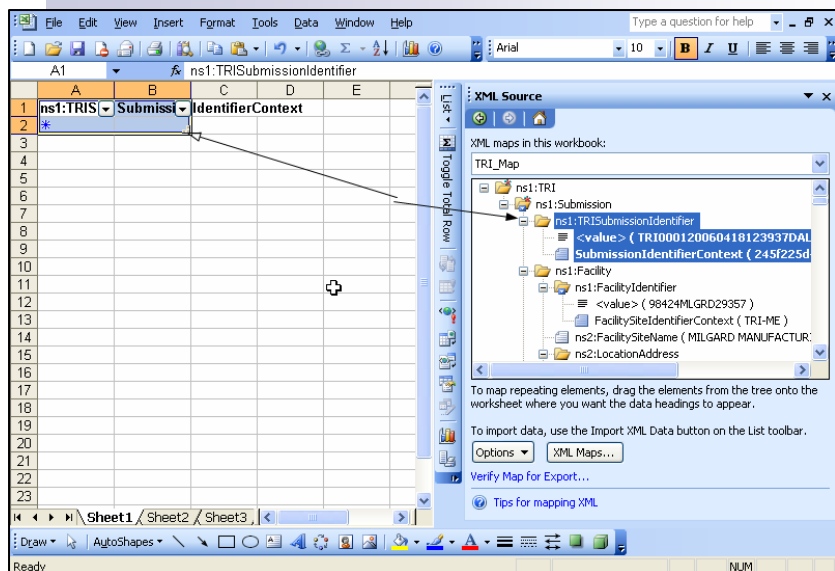


Fig. 4: Choose “ok” to select XML map.



- Highlight your xml source (Figure 3) and select ok (Figure 4).
- At this point, you should see the TRI\_Map for the xml file under the XML source. From this, you can “Click and Drag” the data elements (Figure 5) that you want in your spreadsheet. You can either import groups of data elements like “**ns1: facility**” or individual data elements like “**ns2: FacilitySiteName**”. In this version, the import data elements should be limited to the elements located down to the chemical name in the XML source. You will have problems with your spreadsheet if you import more detailed data elements.

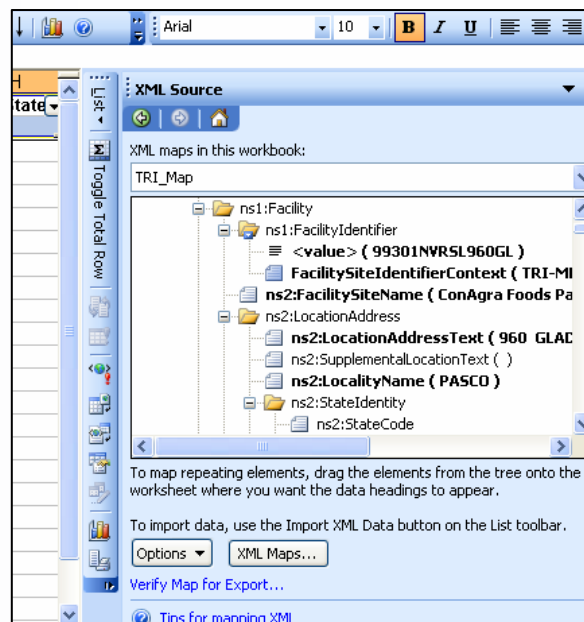
Fig. 5: Select the fields or elements you want in your spreadsheet by “clicking and dragging.”



## Recommendations for Step 8

Recommended elements include **facility identifier (TRIFID)**, **name and location fields**, **technical contact name**, **phone and email**, **reporting year**, **form type and chemical name and CAS**. Click and drag each element from the list to the right of the last element unto the spreadsheet window. The selected elements will be highlighted or bolded on the XML source window. You may see sample values for the elements in the XML source. If this is not the case, select, “options” and “preview data in task pane.” If this option is not available, click anywhere on the spreadsheet to highlight it. Then, select it.

Fig. 6: Selected elements are highlighted on the XML Source map.



# TRI SDX Tracker Instructions

Fig. 7: Close-up of selected elements “Locality Name” and “StateName”.

	H1		ns2:StateName
	G	H	I
1	ns2:LocalityName	ns2:StateName	
2		*	
3			
4			
5			

Fig. 8: Shows selected elements, “SubmissionReportingYear” and “ChemicalNameText”.

	K1		ns1:SubmissionReportingYear
	K	L	
1	ns1:SubmissionReportingYear	ns1:ChemicalNameText	
2	*		
3			
4			
5			
6			
7			

- After completing selection of elements, from the **XML tool bar, select import** and the data for the selected xml file will be imported.

**Note:** If the “XML map properties” is not highlighted, click on the spreadsheet to activate it.

- Then, you need to change the properties for the XML map to “Append new data to existing XML lists”. Here are the instructions from Microsoft Excel-Help to complete this step :

Fig. 10: Append the other files to your spreadsheet.

Name: TRI\_Map

XML schema validation

☐ Validate data against schema for import and export

Data source

☒ Save data source definition in workbook

Data formatting and layout

☒ Adjust column width

☒ Preserve column filter

☒ Preserve number formatting

When refreshing or importing data:

☐ Overwrite existing data with new data

☒ Append new data to existing XML lists

OK Cancel

## From MS Help

- Click on a mapped cell to select the XML map you want.
- On the **Data** menu, point to **XML**, and then click **XML Map Properties**.
- In the **XML Map Properties** dialog box, click one of the following options:

**Overwrite existing data with new data** When XML data is refreshed or re-imported into a map, existing data in the mapped cells, whether a single mapped cell (single-mapped cell: A cell that has been linked to a non-repeating element in an XML map.) Or an XML list is overwritten with the new data.

**Append new data to existing XML lists** When XML data is refreshed or re-imported into a map (see Fig. 10):

- For an XML list, the new data is appended to the end of an XML list.
- For a single mapped cell, the current data is not overwritten (and no data is appended).

# TRI SDX Tracker Instructions

## Objective 2: Importing CDX data from your list of TRI reports

- Choose the “append” option. Now, you can select **Data**, **XML**, and **Import** and highlight all of the other XML files from the browser that you want to add to your list, choose **Import** and you will now have a list of all of your CDX TRI reports.

Fig. 11: Import XML map into workbook .

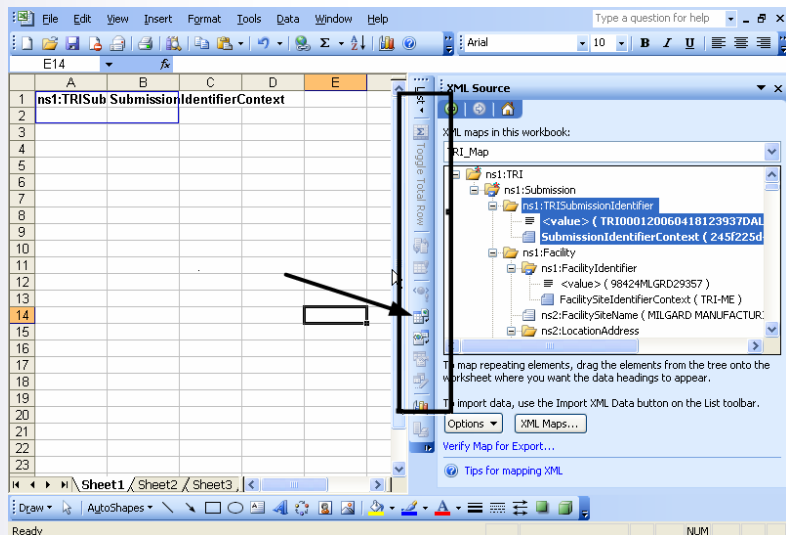
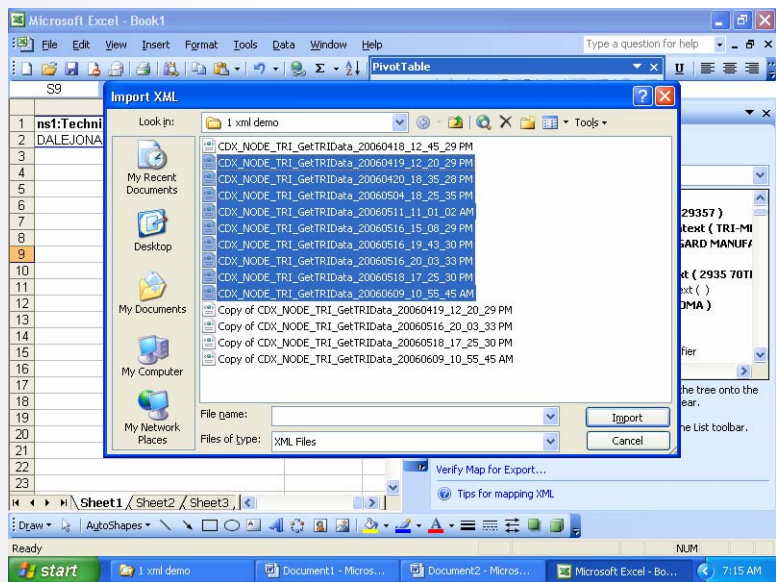


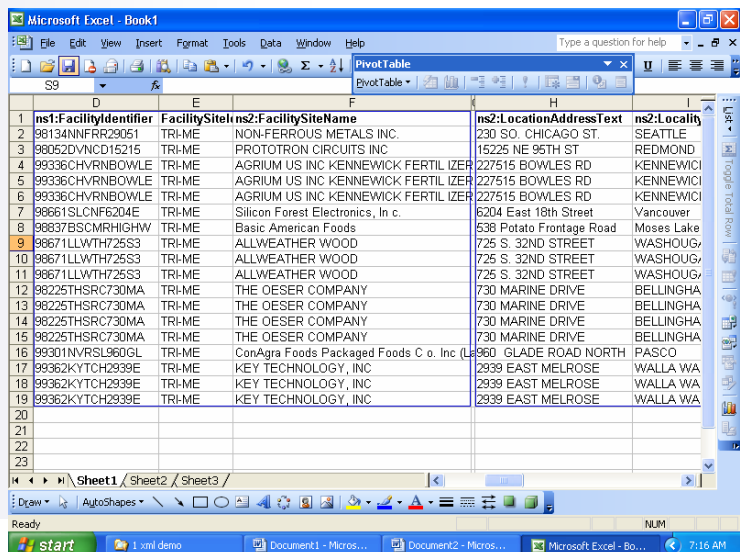
Fig. 12: Highlight the XML files you want to import.



## Objective 3: Displaying your final data results

It really is that easy. You should use the most current year for your formatting import. Changes between years may cause problems.

Fig. 13: Your data has been imported.

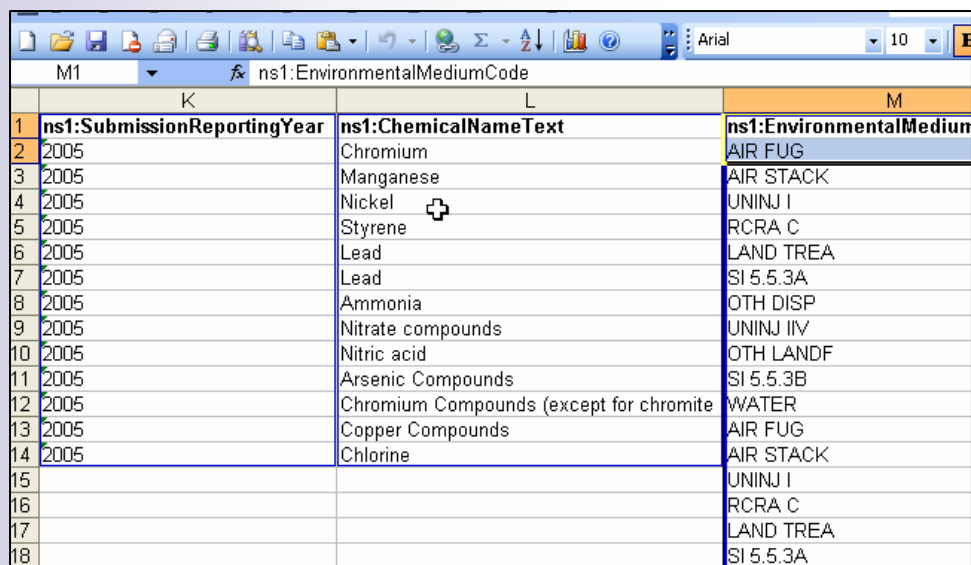


ns1:FacilityIdentifier	FacilitySite	ns2:FacilityName	ns2:LocationAddressText	ns2:Locality
36134NFR23051	TRI-ME	NON-FERROUS METALS INC.	230 SO. CHICAGO ST.	SEATTLE
36082DVNC15215	TRI-ME	PROTOTRON CIRCUITS INC	15225 NIE 95TH ST	REDMOND
99336CHVRNBOWLE	TRI-ME	AGRIUM US INC KENNEWICK FERTILIZER	227515 BOWLES RD	KENNEWICK
99336CHVRNBOWLE	TRI-ME	AGRIUM US INC KENNEWICK FERTILIZER	227515 BOWLES RD	KENNEWICK
99336CHVRNBOWLE	TRI-ME	AGRIUM US INC KENNEWICK FERTILIZER	227515 BOWLES RD	KENNEWICK
98661SLCNF6204E	TRI-ME	Silicon Forest Electronics, Inc.	6204 East 18th Street	Vancouver
98837BSCMRHIGHW	TRI-ME	Basic American Foods	538 Potato Frontage Road	Moses Lake
98671LLWTH725S3	TRI-ME	ALLWEATHER WOOD	725 S. 32ND STREET	WASHOU
98671LLWTH725S3	TRI-ME	ALLWEATHER WOOD	725 S. 32ND STREET	WASHOU
98671LLWTH725S3	TRI-ME	ALLWEATHER WOOD	725 S. 32ND STREET	WASHOU
98225THSRC730MA	TRI-ME	THE OESER COMPANY	730 MARINE DRIVE	BELLINGHA
98225THSRC730MA	TRI-ME	THE OESER COMPANY	730 MARINE DRIVE	BELLINGHA
98225THSRC730MA	TRI-ME	THE OESER COMPANY	730 MARINE DRIVE	BELLINGHA
98225THSRC730MA	TRI-ME	THE OESER COMPANY	730 MARINE DRIVE	BELLINGHA
99301NVRSL960GL	TRI-ME	ConAgra Foods Packaged Foods Co. Inc. (L	960 GLADE ROAD NORTH	PASCO
99362KYTCH2339E	TRI-ME	KEY TECHNOLOGY, INC	2939 EAST MELROSE	WALLA WA
99362KYTCH2339E	TRI-ME	KEY TECHNOLOGY, INC	2939 EAST MELROSE	WALLA WA
99362KYTCH2339E	TRI-ME	KEY TECHNOLOGY, INC	2939 EAST MELROSE	WALLA WA

## TRI SDX Tracker Instructions

### Trouble shooting

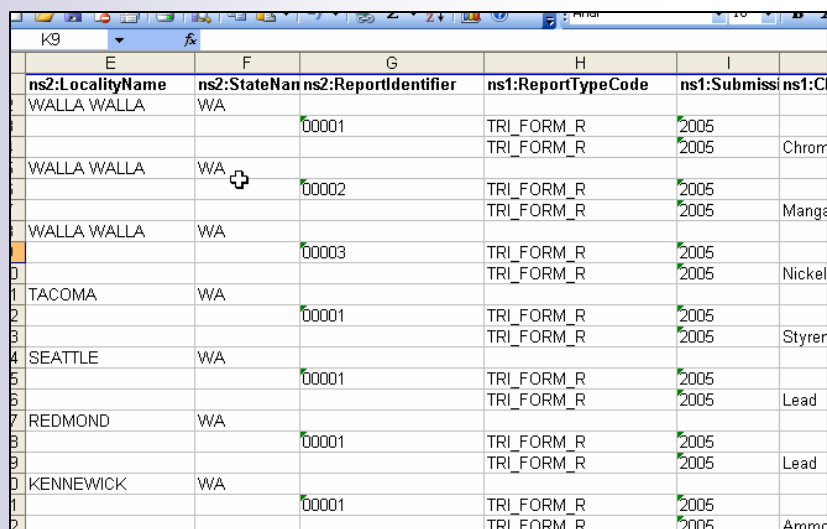
- If your spreadsheet looks like this, you need to limit the number of data elements to get a workable spreadsheet (see step 8).



	K	L	M
1	ns1:SubmissionReportingYear	ns1:ChemicalNameText	ns1:EnvironmentalMediumCode
2	2005	Chromium	AIR FUG
3	2005	Manganese	AIR STACK
4	2005	Nickel	UNINJ I
5	2005	Styrene	RCRA C
6	2005	Lead	LAND TREA
7	2005	Lead	SI 5.5.3A
8	2005	Ammonia	OTH DISP
9	2005	Nitrate compounds	UNINJ IIV
10	2005	Nitric acid	OTH LANDF
11	2005	Arsenic Compounds	SI 5.5.3B
12	2005	Chromium Compounds (except for chromite)	WATER
13	2005	Copper Compounds	AIR FUG
14	2005	Chlorine	AIR STACK
15			UNINJ I
16			RCRA C
17			LAND TREA
18			SI 5.5.3A

Figure 14: Worksheet with too many data elements.

- If your spreadsheet looks like this, you did not “deselect” the merge option (see step 4- task 2).



	E	F	G	H	I	J
1	ns2:LocalityName	ns2:StateName	ns2:ReportIdentifier	ns1:ReportTypeCode	ns1:SubmissionYear	ns1:ChemicalNameText
2	WALLA WALLA	WA	00001	TRI_FORM_R	2005	
3	WALLA WALLA	WA	00002	TRI_FORM_R	2005	Chromium
4	WALLA WALLA	WA	00003	TRI_FORM_R	2005	Manganese
5	TACOMA	WA	00001	TRI_FORM_R	2005	Nickel
6	SEATTLE	WA	00001	TRI_FORM_R	2005	Styrene
7	REDMOND	WA	00001	TRI_FORM_R	2005	Lead
8	KENNEWICK	WA	00001	TRI_FORM_R	2005	Lead
9						Ammonia

Figure 15: Merge option not selected

#### For further assistance, contact:

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- Juan Parra, [Parra.Juan@epa.gov](mailto:Parra.Juan@epa.gov), or call 202-566-0499